

Implementing an Open News and Information System in the Vanderbilt University Libraries

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Setting the Change Stage

In the complex environment of a research university library, effective and timely communication between upper-level administration, staff, and the various branch libraries and departments is mission-critical to a successful organization. The change described in this chapter took place in 2017 in the Jean and Alexander Heard Libraries at Vanderbilt University in Nashville, Tennessee. Vanderbilt is a Carnegie R1 research university with 11,782 total full-time students and 4,716 total faculty. The Heard Libraries system consists of nine libraries and a total of approximately 160 staff members.

In many ways, the history of the Jean and Alexander Heard Libraries at Vanderbilt mirrors the history of other academic libraries: a nineteenth-century founding, a devastating fire, acquisition of extensive resources, expansions and renovations of facilities, and the introduction and improvement of computer-based catalogs. Around the year 2008, library staff were basking in the knowledge that reading a daily email digest of “Library Staff News” was cutting-edge communication technology and a sound replacement for the paper and web-based memos that had been issued until that time.

Unfortunately, nine years later, the Heard Libraries’ staff members were still getting the same daily email digest. The content was new every day, but the email looked exactly as it had looked when it was first implemented: plain text with long URLs that linked to a publicly available webpage. The emails were simple and old-fashioned, but more important, it was evident that swaths of people were not reading their daily Library Staff

News emails at all. The bottom line: these emails were no longer working. Stagnation and complacency had set in.

Library administration attempted several tactics to improve communication of top-down messages, but results were uneven. Some staff were happy to hear of library news from their divisional supervisors, but trickle-down information-sharing practices resulted in staff in some areas learning key information more quickly than in other areas. It was fairly common to be talking with a colleague from another library and hear of an event or a meeting that hadn't been announced and say, "Why wasn't that in the Staff News?"

A related problem was the library staff intranet, referred to as the Staffweb. Also implemented at the turn of the millennium, the page had evolved over time from an HTML webpage to a Drupal site. In 2012, the library administration decided that the Staffweb should no longer be updated and that all information would be moved to the library's SharePoint website. Due to a combination of problematic implementation and lack of user acceptance, SharePoint has never been particularly effective at managing communication.

A culminating problem was an administrative decision that committee meeting minutes would no longer be shared using the daily email, but would be posted on SharePoint instead. This further weakened the relevance of the Staff News and contributed to its lack of reader penetration.

The change process described in this chapter consisted of a complete re-engineering of the internal communication system and an innovation in the platform and tools that were chosen to implement the new system. The result of the change was a new resource, called Heard Alert, a substantial revitalization of internal communication in the library, and the implementation of a clean, secure, and flexible intranet platform.

The scope of the change involved the entire library system, plus a few important campus stakeholders, eventually gaining the attention of the Vice Provost of Learning and Residential Affairs and the campus communications department.

I. Warm-up Phase

STAGE 1: ESTABLISHING A SENSE OF URGENCY

Library staff frequently complained about the stagnant, closed communications channels and staff intranet. Library administration was never able to make a clear case for improving the Staff News or the Staffweb—it was hard to justify allocating resources to noncritical issues when there were always bigger projects and other problems to solve. What created the sense of urgency, however, was a push from the new University Librarian, who identified communication as a problem and made it a prioritized area of focus. She convened a leadership group retreat in the summer of 2016 to address this problem. An action item that came out of the retreat was to create a short-term task force—specifically not a long-term committee—to make recommendations about how internal communication might be improved.

The Deputy University Librarian convened an Internal Communications Task Force (henceforth ICTF), which began meeting that fall and was given a rather aggressive timeline: recommendations were to be submitted within three months. The team consisted of seven members of the library staff: six librarians and one administrative assistant. All

were long-time employees and had been with the libraries for a minimum of ten years. One librarian was a member of the library's IT team, and one librarian was the content manager for the library website.

The ICTF met weekly and worked extensively together over email. To gather data and opinions about usage, they analyzed data from Google Analytics and administered a survey to library staff. To determine effective communications channels across campus, the group reviewed communications tools used in other areas of Vanderbilt University. They looked at a few technology options, such as Slack, to see whether these would be the kinds of solutions that would be willingly adopted by members of the library staff.

The task force found library staff were enthusiastic about the possibility of changes in communication. The survey received a 54 percent response rate, and staff overwhelmingly reported that they were unhappy with current communication in general, and with the Staff News in particular. Library staff strongly preferred to continue getting communications through email but desired a change to a different format and system. A fair amount of criticism was aimed at library administration, with comments that communication from above was often murky, secretive, inconsistent, and unevenly distributed.

The ICTF report made four recommendations to administration:

1. Make regular communication from library leadership a top priority.
2. Enable all library staff to openly post to the Staff News without approval or mediation; restrict access to Vanderbilt ID only, no search engine crawling.
3. Revitalize the Staffweb.
4. Create a central location for calendars.

For the last three recommendations, library administration convened an Implementation Team.

The goals of the Implementation Team were specific to this situation, but if generalized, they are exactly what Kotter recommends in a common goal: *create something sensible to the head and appealing to the heart.*¹

At this point in the timeline, oversight of the project was moved from the Deputy University Librarian to the Associate University Librarian for Research and Learning.

STAGE 2: CREATING THE GUIDING COALITION

Library administration appointed a chair from the ICTF to lead the Implementation Team. The chair then chose one member from the original task force and one new member from library IT. This was to become the guiding coalition. Kotter emphasizes using careful selection methods to ensure that the key players on a team have a good mix of skills and experience to be effective.² The chair selected a team that had worked well together before. One member maintained the library's website, and the other was the Drupal administrator for the Staffweb.

The chair knew that the three team members had a good mix of creativity, pragmatism, and discipline. Each was well-connected and well-respected by library staff across campus, and their work would be taken seriously. They were all savvy enough to avoid landmines in both the technological and political realms. Most important, the three of them all had the main component necessary to create teamwork: trust.³ Because of the

established sense of trust and the group's dynamics, they were able to achieve a high level of productivity while maintaining good spirits.

The Implementation Team was deliberately small. Larger groups tend to have a hard time focusing on a course of action and run the risk of including members that Kotter warns about: big egos, people who create mistrust, and reluctant players.⁴

Although none of the team were in management roles, the group was in a power position—uninvolved peers would not easily be able to block progress. Because the group had the backing of administration, they knew they could expect support from above. The team was given sufficient autonomy to create solutions that would work for the existing library culture and community. Because the ICTF had left the goals sufficiently vague, this allowed the Implementation Team the flexibility to choose which tools to explore.

STAGE 3: DEVELOPING A VISION AND STRATEGY

| TOOLS THE TEAM INVESTIGATED |
|---|
| <ul style="list-style-type: none"> ▪ Shared Outlook Calendar: Already implemented, with extremely low user acceptance due to technological challenges and a clunky interface ▪ Microsoft Office 365 Planner / Microsoft Teams: Campus policies were not conducive to these systems ▪ Basecamp: Good for project management, but too complicated for casual daily interaction ▪ Goodbits: Good for creating a curated newsletter, but had no function to automatically create a daily email from an RSS feed ▪ Emma: Did not support RSS-to-email functionality ▪ MailChimp: Supported RSS-to-email functionality, but did not support an authenticated RSS feed ▪ SpringShare Calendar: Had a robust API, but interface was difficult to navigate; access for all staff would be difficult to maintain ▪ Slack: Excellent for communication, but met with great resistance by some staff who felt that adding another communication channel would be disruptive to their workflow ▪ Bedework: Met all requirements, but funding for a Bedework developer was not approved ▪ VU Campus Calendar: Viewable by the public, which would not work for library-staff-only events, such as birthday celebrations and candidate interview schedules |

The team's vision was to increase trust and transparency by creating a culture of open communication in all directions.

The Implementation Team knew that there were two important elements to making sure this part of the project was successful: technology and buy-in from staff.

The team initially hoped to find one tool that would incorporate news, calendar, and intranet resources. Alas, any enterprise solutions available were either prohibitively expensive or incompatible with existing IT structures (figure 24.1).

An unavoidable part of any process is trying out possible solutions that do not ultimately work for that specific situation. The authors feel that it is important to look at these failed attempts, because they often require excessive time. Figuring out when to abandon something is often a delicate balance between idealistic perseverance and stubborn determination.

FIGURE 24.1
Tools the team investigated

An important point in the development of the team's vision was when the ICTF identified and articulated a major problem with the Staff News (figure 24.2). It was simultaneously too open and too closed—available on an open website and crawled by search engines, yet only

two people had permission to create posts. This created a situation of low trust and high visibility. The new vision was looking toward a picture of the future where library staff would have a space where any library staff member could share information with other members of the library staff via unmediated post submissions. This would make inroads to create higher levels of trust throughout the library organization.

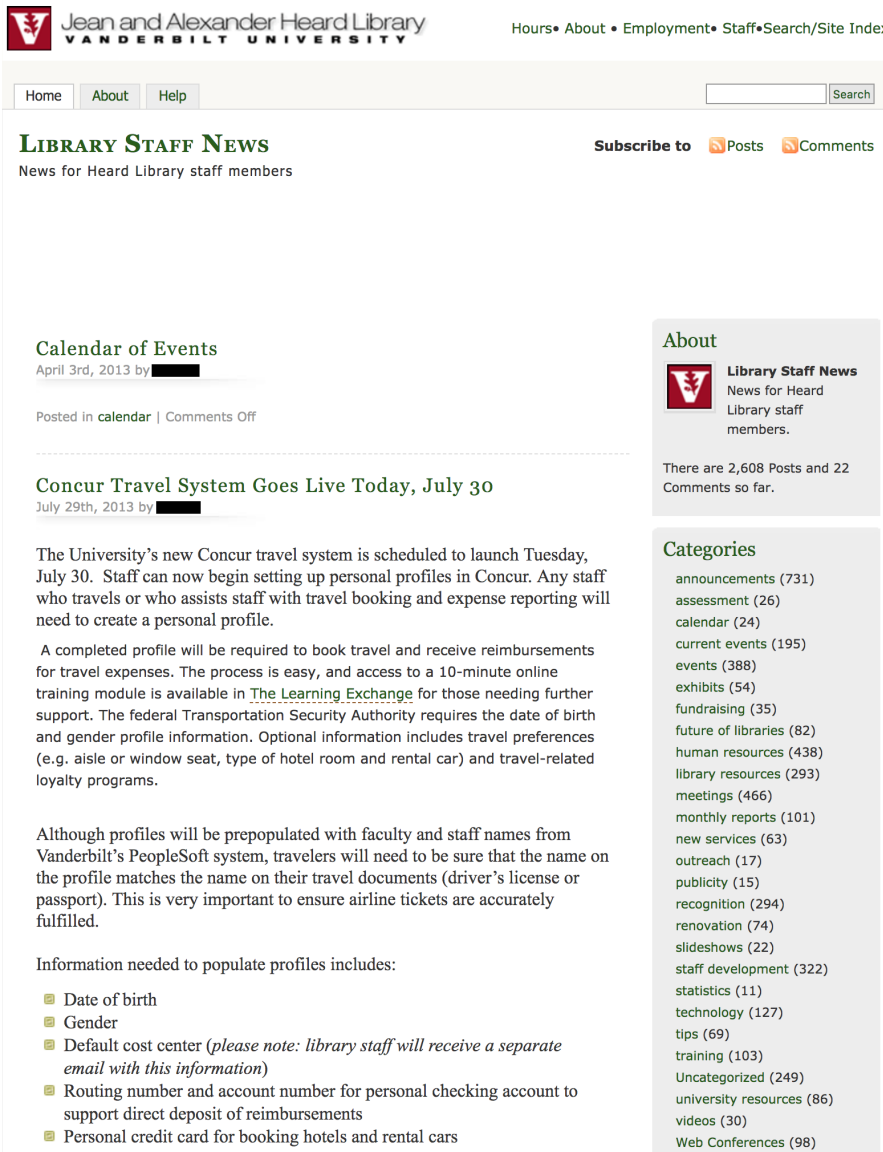


FIGURE 24.2
The old Staff News homepage.

When the team took a hard look at the Staff News, they discovered that the existing technical platform, WordPress, would work well with some changes:

- **Look and feel:** The WordPress theme had not been updated for approximately ten years. A modern theme would make people view the page as more relevant and useful.
- **Who could view:** The existing site was open to the public. Putting the site behind a login would create a sense of privacy.
- **Who could post:** The existing setup allowed only a handful of editors. Making everyone an editor within the WordPress site was not reasonable, but finding and adapting an entry submission form would allow an easy way for any staff member to post an item.
- **Email format:** The existing text-only solution was implemented approximately ten years ago. WordPress had plug-ins that would allow for modern, attractive emails.

WordPress is also free and open-source, making it easy to set up and customize for the library's needs.

Once the team realized that WordPress would be a viable platform, they set to work finding the exact solutions: themes (Suri, with a custom child theme), technology that would allow people to log in with their Vanderbilt-issued ID (SSO), a post submission plug-in (User Submitted Posts), and an email plug-in (MailPoet). The effort to settle on these solutions and making them work together took a fair amount of research and testing. Setting up all of these components required a significant amount of technical expertise and time, which was primarily accomplished by the team's library IT staff member.

The Implementation Team kept the user experience in mind at every step of the process. Whatever the solution was, it had to be simple, intuitive, and attractive. Posting a news item should be easy and painless, even for someone who isn't terribly comfortable with websites or social media. Receiving the email each day should be a pleasant experience: the email should have links that work correctly, include enough information to let people gauge whether or not they want to read more about something, and be mobile-friendly.

After the theme was implemented, the team began migrating content from the old Staffweb intranet so that the WordPress site would become both the Staff News blog and the Staffweb: two resources rolled into one location. This was an entirely new idea, but one that would appeal to all library staff. Once this part of the work fell into place, things began to move rapidly.

A couple of months into the implementation, the big-picture questions were out of the way. At this point, the team was able to start focusing on the dozens of small questions that needed answers: post categories, adjustments to the layout and theme, and wording for the post contribution form. The Library Advisory Council, an elected group of library staff, branded this new system "Heard Alert" (figure 24.3).


STAGE 4: COMMUNICATING THE CHANGE VISION

The Implementation Team worked on communication strategies both large and official and small and political. Official changes included announcing the new service at an all-staff town hall meeting, writing posts for the Staff News, and leading discussions in the Library Advisory Council. Small-scale efforts included political strategizing, such as having private conversations with individuals who expressed hesitant feelings, asking people to post items, and generating buy-in by asking many people to test the system.


Heard Alert

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“Vanderbilt Silver” Exhibition Explores University Treasures & Traditions


July 23, 2018
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The history of silver at Vanderbilt University is rooted in the great American fortune of founder Cornelius Vanderbilt. In 1873, when Vanderbilt made the first part of his gift to found what would in 1875 become Vanderbilt University, he was arguably the richest man in the world. He rose from humble beginnings as a skipper ferrying passengers from Staten Island to Manhattan to become a railroads and shipping companies magnate. Among the artifacts in this exhibition is his engraved gold cigar box – a gift “To Commodore Vanderbilt from a stockholder, 1868.”

These roots of Commodore Vanderbilt himself paved the way for a tradition of using silver to mark important ceremonies and award recipients at the university. The selection of silver on display draws up memorable moments in the university’s history, aims to introduce the vast art of silver making, and in many cases, comes to us directly from the Vanderbilt family.

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FIGURE 24.3

The new Heard Alert homepage.

The Implementation Team demonstrated the new system at an all-staff town hall meeting. This monthly meeting was a place where new plans were often introduced and gave everyone the opportunity to ask questions. The group spoke briefly about the project goals and timeline, and let staff know what to expect. Library staff members were genuinely excited when they saw the prototype of the site.

Saying that anyone can post to a blog is easy; getting people to actually participate is more challenging. The team knew that getting buy-in from staff was extremely important. People were accustomed to having no voice. If they were asked to post something, it was usually an official message, and they had historically sent it to one of the Staff News editors. The new system would be different and exciting because it had the potential to shape an open communication culture. Many people resisted the very idea; “But, what if...” was a common way that people began the phrasing of their question. The Implementation Team decided that they would take a two-pronged attack to people’s hesitance:

1. Reminding people, “Your professional reputation is at stake!” A lighthearted tone helped with this, such as the reminder that “If you post about kittens every few days, you are going to be known as That Kitten Guy. Act accordingly.”
2. Acting as ambassadors to the new system. They asked people to post things. “That’s a great idea! Why don’t you post it to Heard Alert?”

Before the page was unveiled to everyone, several people were asked to test the system. The beta testers were the members of the original ICTF. Getting their support was a strategic way to create buy-in for the new system, thus making sure that acceptance of the system would spread. Sadly, there have been instances in the past where an implementation team did not keep the original planners in the loop. This can result in bitterness, subverting the message, and a lack of support, which can ultimately lead to a failure for the initiative. Therefore, the Implementation Team was very careful to respond positively to any changes suggested by the ICTF. One such suggestion was to change the default font color to a darker gray to increase contrast and improve accessibility.

Heard Alert went live in June 2017. In the first year, there were approximately 500 posts from seventy-five staff members. This represents approximately 47 percent of library staff—an excellent participation rate.

II. Introducing New Practices Phase

STAGE 5: EMPOWERING BROAD-BASED ACTION

The initial focus of the project was to create an open communication system whereby any staff member could post on any topic without first seeking approval. In contrast to the previous staff news system, Heard Alert would empower staff to have a voice outside of the normal administrative hierarchy. Together with this empowerment came the responsibility to communicate and be knowledgeable about what had been communicated. Blaming lack of communication on the administrators could no longer be a valid option.

The group made sure to avoid Kotter's "Barriers to Empowerment."⁵ In particular, the group was careful to make it as easy as possible for all staff to participate, thus avoiding three of the common barriers to empowerment:

- formal structures making it difficult to act,
- a lack of needed skills undermining action, and
- personnel and information systems making it difficult to act.

One of the group's key goals was that there would be no training required to use the system. The submission form was carefully designed to make posting easy and immediate, as opposed to the old system, which would allow only specific people to make posts. In this brave new world, library staff reported feeling a certain satisfaction when they posted to Heard Alert for the first time: it felt risky, having the newly acquired ability to send a message to everyone. Some people worried that they weren't capable of posting and asked an administrative assistant to post for them, but with a little encouragement, even the least technologically adventurous staff found the posting process to be easy.

During the planning phase, the Implementation Team fought skepticism that staff might post trivial or inappropriate content, but this has not been the case. Not even one post has been censored due to content. Instead, staff feel empowered to share information, and everyone understands the implication of carefully writing and editing the content that they post. The idea that "we are sensible people" has been proven accurate. As Kotter cautions: going forward, it will be important for administration to avoid second-guessing or criticizing posts written by staff.⁶ If people are criticized for communication, communication will dry up.

STAGE 6: GENERATING SHORT-TERM WINS

Not long after launching Heard Alert, people began asking for enhancements. Could we enable comments? Could we add a Like button? It was particularly satisfying when these requests were supported by people who were previously skeptical about giving library staff the ability to make unmediated posts. The team was able to enable comments: another short-term win.

Staff asked the team to create posts for them, and with gentle encouragement they were able to see that Heard Alert wasn't hard to use. This gave people a feeling of satisfaction and empowerment. Improved email formatting received lots of positive feedback and was a clear upgrade from the previous email layout. Simply getting a more attractive daily email made people happier and more knowledgeable about their workplace.

The Implementation Team kept up morale and did not get bogged down by the process or the people. It helped to be confident in working on something that was for the good of the staff and that was satisfying.

STAGE 7: CONSOLIDATING GAINS AND PRODUCING MORE CHANGE

Heard Alert was rolled out only one year ago from the time of this writing, so time will tell about its success, but to date it is an unqualified improvement. While it didn't change all systems in the library, it did change the fundamental system by which all staff are glued together in a common enterprise. One interesting observation: when new staff are hired, it's not very long before they post to Heard Alert. This shows that the system is respected and used as the primary communication vehicle by library staff, which is satisfying.

As soon as Heard Alert rolled out, more changes were poised to happen. The team created a technical platform on WordPress to support the spin-off of other intranet sites, giving staff even more options for communication within their units, committees, and groups. The Science and Engineering Library asked for a new intranet tool for its service desk staff, which was implemented successfully. The Access Services group asked for a blog in which they could privately share security information.

Many new menu items have been added to Heard Alert since the rollout. It is now the go-to location for system-wide information for library staff. Monthly birthday announcements had previously been a privacy concern, as staff were not comfortable having their birthdays published on the open web; this system provided a safer alternative. Monthly birthday parties with cake became a morale booster. Things like trainings, funding opportunities, and announcements are posted more often than they were in the old system. This is likely because people don't have to go through the extra step of asking an intermediary to post for them.

In general, the group didn't face much in the way of complacency or resistance. Commitment to each other and to the group was solid, and because of this, the Implementation Team accomplished a great deal.

However, perhaps a few moments of honest reflection are necessary before too much celebration happens. After all, only a year has passed, and Kotter warns us that real change takes many years and must endure staffing changes, reorganizations, and unexpected problems.⁷

III. Grounding Phase

STAGE 8: ANCHORING NEW APPROACHES IN THE CULTURE

Ideally, a well-informed and engaged staff makes for a more effective organization. Heard Alert provides the library with an open system of communication for all staff. Having an open communication system like Heard Alert in place promotes a healthy work culture and improves morale. The next steps for the library may include other open and transparent ways for staff to communicate with each other, and for upper administration to participate as well.

The Heard Alert system is in place and anchored. Its viability is a necessity in that the library urgently needed a staff news platform and intranet. The WordPress platform is easy for library IT to maintain and had the added benefit that it increased knowledge and usage of WordPress in other areas of the library, such as the exhibits program.

The popularity of the service can be seen in continued talk among staff about Heard Alert—“We should post that to Heard Alert,” and “Did you see that announcement on Heard Alert?”

The Implementation Team was awarded the 2018 Friends of Vanderbilt University Libraries’ Award for excellence in a committee, task force, unit, or other library group. The award honors the work of a team, committee, or task force that developed and followed through on an idea resulting in streamlined workflows, cost savings, enhanced services, or boosted morale in a department, library, or across the libraries. The award recognizes collaborative work and collegiality.

Analysis and Conclusions

Analyzing the process through the Kotter lens helped the team reframe some aspects of the project that may have seemed unimportant or incidental, but that were actually a large part of the project’s success, such as the effectiveness of the team. The project team asked the right questions; had the right experience, motivation, and commitment; had buy-in from administration; and found solutions that were both manageable and user-centric. As a small team that had worked together previously, they had a nice mix of skills and experience. They were quite motivated to improve organizational culture and overall morale. The fact that the team knew who to ask for assistance or advice and persisted until the question was answered contributed to the success of this project.

The Kotter framework was not part of the original plan, but it is easy to see how such a method would have been helpful if it were employed from the outset. Although the book emphasized that several phases of the method could be happening at the same time, it would be most useful to create a project plan and checklist while incorporating the advice in *Leading Change*.

Notes

1. John P. Kotter, *Leading Change* (Boston: Harvard Business Review Press, 1996), 59–60.
2. Kotter, *Leading Change*, 57.
3. Kotter, *Leading Change*, 61.
4. Kotter, *Leading Change*, 59–60.
5. Kotter, *Leading Change*, 102.
6. Kotter, *Leading Change*, 112–14.

7. Kotter, *Leading Change*, 143–44.

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Kotter, John P. *Leading Change*. Boston: Harvard Business Review Press, 1996.

